



Aligned Partners

TRUST COMPANY

AGENT FOR TRUSTEE

Aligned Partners Trust Company assists individual Trustees in carrying out their fiduciary duties in a professional and cost effective manner. The individual Trustee can rely on Aligned Partners to perform many of the more burdensome responsibilities associated with the role of Trustee. Aligned Partners supports an individual Trustee at his or her direction with the following services:

- ✧ Invest the trust assets*
- ✧ Recordkeeping and Accounting
- ✧ Quarterly Statements
- ✧ Process Distributions
- ✧ Notice Preparation
- ✧ Prepare Tax Returns
- ✧ Performance Measurement
- ✧ Planning and Advice

Asset Range	Annual Fee**
Up to \$1,500,000	1.00%
\$1,500,001 to \$3,000,000	0.75%
Over \$3,000,001	0.50%

* Aligned Partners is willing to work with independent investment advisors. Certain custodians are preferred in order to interface with our financial platform. Please refer to service sheet titled Trustee with Independent Investment Advisor for fees.

** Fees include custody, investment management, and tax preparation services. When unusual or extraordinary services are requested or required, reasonable additional fees may be charged.